

Leading the **Integration** Revolution

Your business problems have changed.
Why hasn't your integration solution?

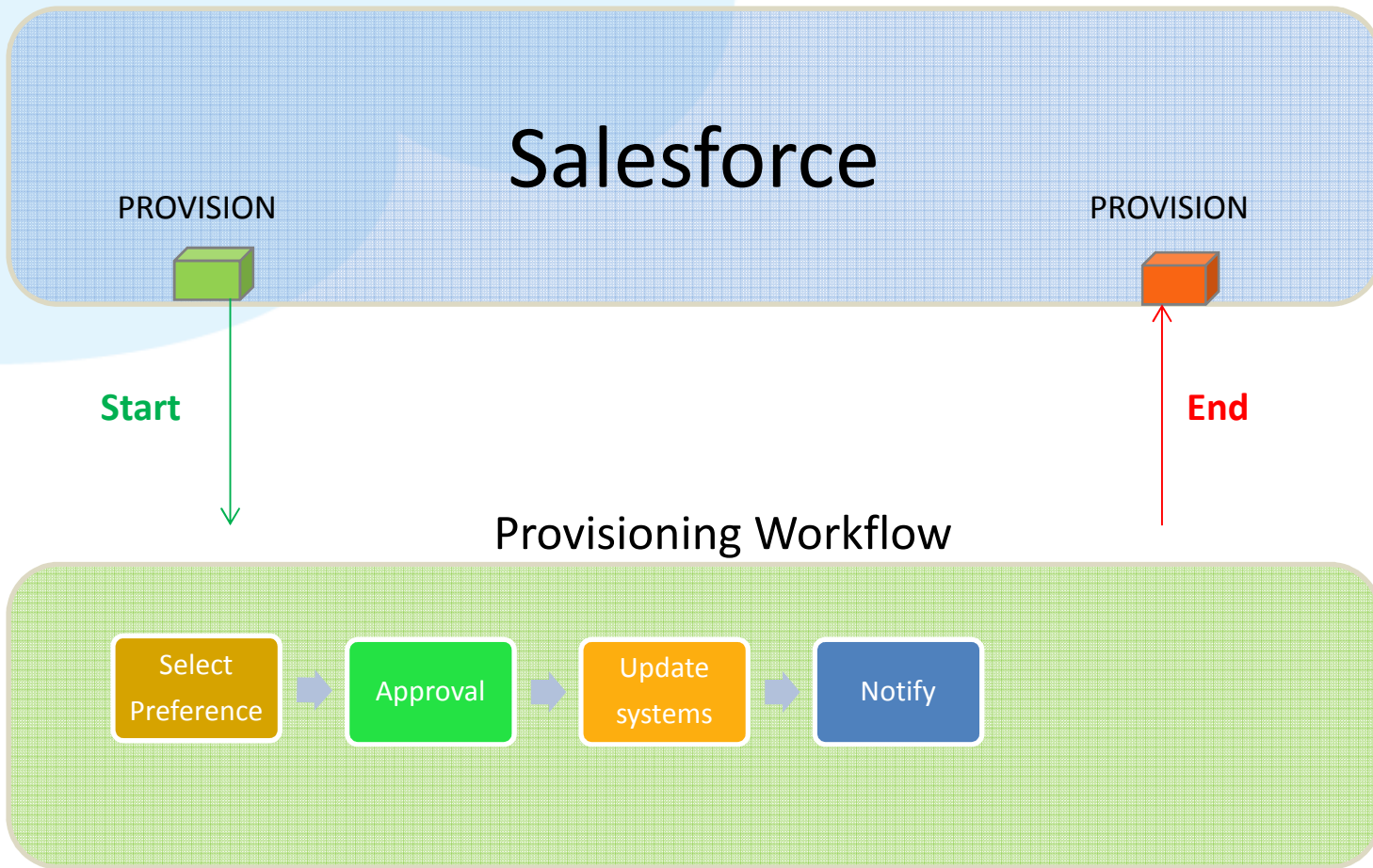


ADEPTIA

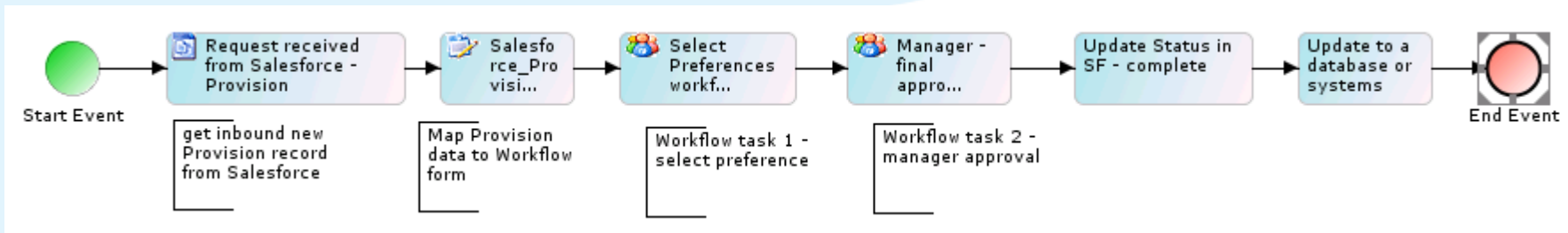


Use Case: Integrate Salesforce with Workflows

High-level Scenario: HR Provisioning workflow



Technical Design: HR Provisioning workflow



Salesforce triggers a HR Provisioning orchestration that routes the workflow tasks to different Users in an organization to provision a new employee.

This workflow provides a template that can be further modified by configuring additional steps or rules. Main goal of this example is to show how to publish a workflow as a Web Service that Salesforce or any other Cloud based application can trigger within Adeptia when a new record is created in that system.

Refer to the walkthrough document for more information. Deploy the attached Deployable solution to run the use case in your local Adeptia instance. Also refer to the Use Case video for more details.



Let's build the process flow

Design methodology

Design

Design a high level process flow

Configure

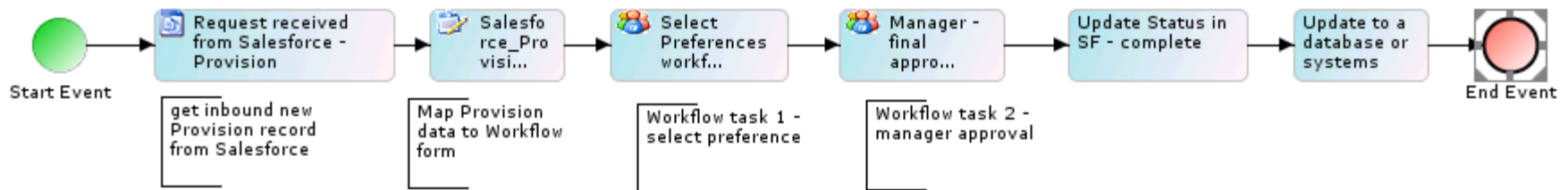
Configure all the activities in the process flow

Deploy

Publish the Process as a Web Service

Design: Process Flow

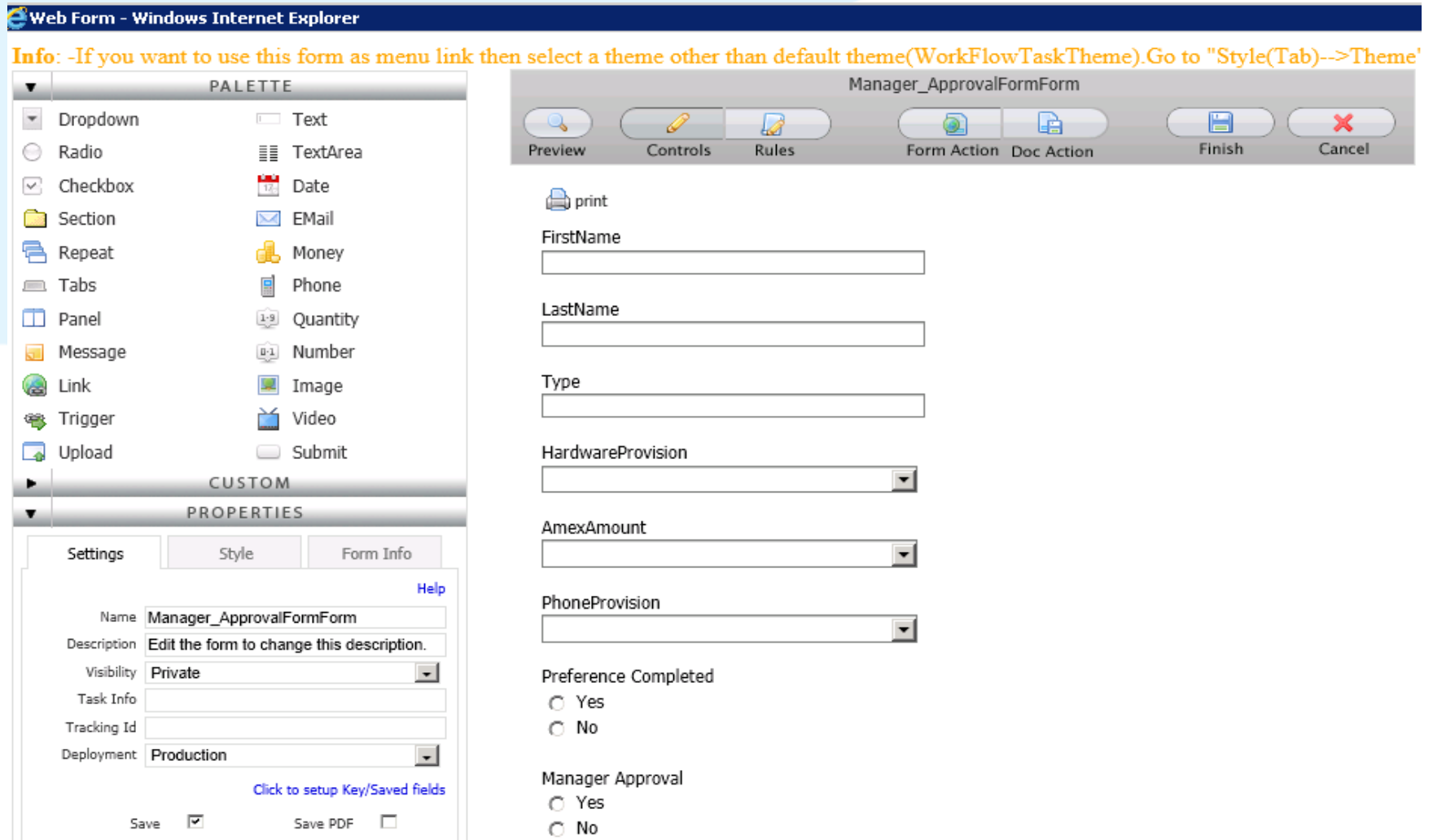
Please refer to the Use Case video describing how to build and publish a workflow as a Web Service



Configure – Workflow forms

Web Form - Windows Internet Explorer

Info: -If you want to use this form as menu link then select a theme other than default theme(WorkFlowTaskTheme).Go to "Style(Tab)-->Theme'



PALETTE

- Dropdown
- Radio
- Checkbox
- Section
- Repeat
- Tabs
- Panel
- Message
- Link
- Trigger
- Upload
- Text
- TextArea
- Date
- Email
- Money
- Phone
- Quantity
- Number
- Image
- Video
- Submit

CUSTOM

PROPERTIES

Settings | Style | Form Info

Name: Manager_ApprovalFormForm

Description: Edit the form to change this description.

Visibility: Private

Task Info:

Tracking Id:

Deployment: Production

Save Save PDF

Manager_ApprovalFormForm

Preview | Controls | Rules | Form Action | Doc Action | Finish | Cancel

print

FirstName

LastName

Type

HardwareProvision

AmexAmount

PhoneProvision

Preference Completed

Yes

No

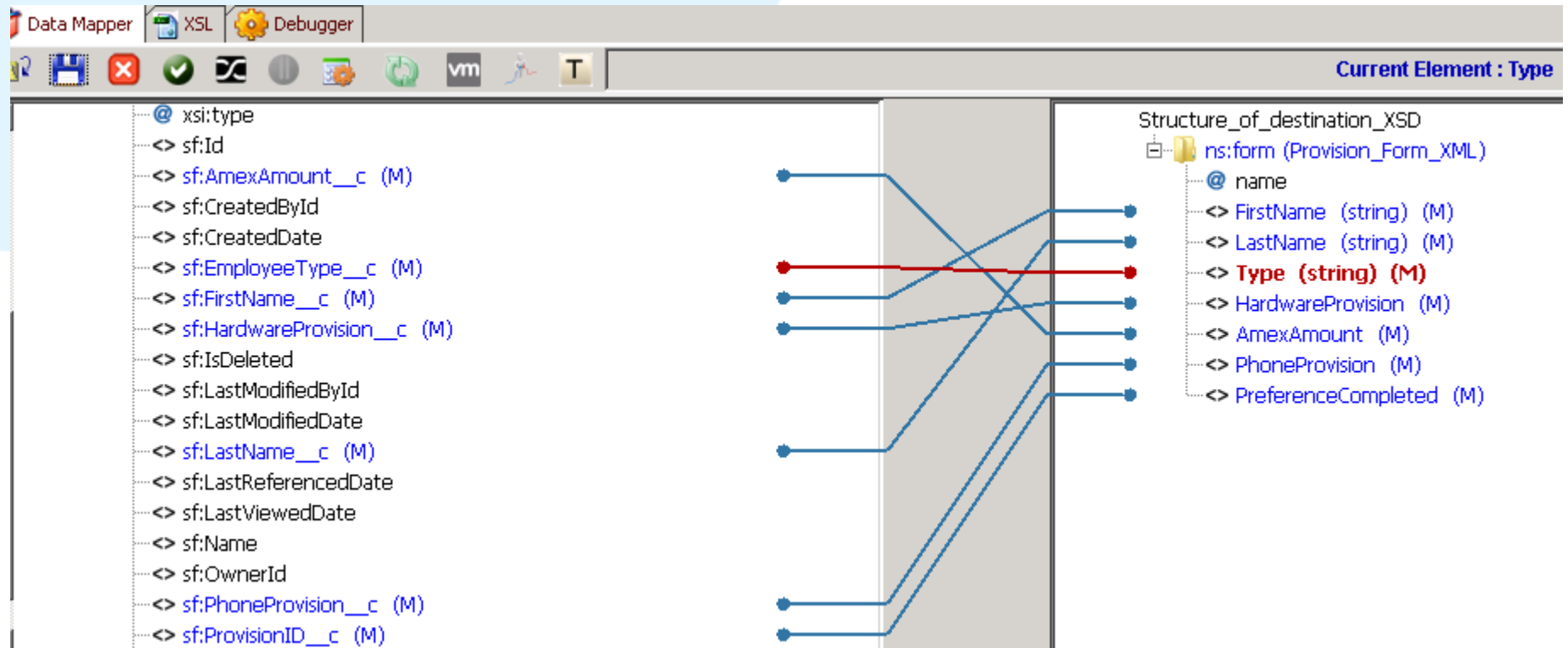
Manager Approval

Yes

No

Configure – Map Salesforce Provision to Form fields

Incoming data from Salesforce containing Provision record needs to be mapped to form XML in the Mapper so that the subsequent workflow task form fields can show the source data



Deploy – Publish process flow as Web Service

Process flow is published as a Web Service that is configured as outbound message rule in Salesforce.

Home | Develop | Monitor

Projects | Solutions | Process | Services | Events | Web Forms | Reports and Dashboards

Services > Web Services > Provider

Synchronize Delete Create New

Name	Description	Style	WSDL	Owner	Project Name
<input type="checkbox"/> HR_Provisioning	HR Provisioning web service	<input checked="" type="checkbox"/> SOAP	View Download	sfdeveloper	UseCase_Salesforce_Workflow

Web Service Provider: HR_Provisioning

Name* HR_Provisioning

Description* HR Provisioning web service

Character Set Encoding* ISO-8859-1

Publish Type SOAP REST

Upload WSDL* No

Operation Name* provision

Request Service Name* employeeprovisioning

Service Location* services

Enable SSL

Select Port 8080

This Web Service will be published without SSL. In case you want to define a new port then you need to add SelectChannelConnector (refer to the section Connector's definition in jetty.xml).

Soap Version* SOAP 1.1

Process Flow Name* UseCase_Salesforce_Workflow

In Salesforce – Define Outbound rule

Please refer to the Use Case video for more details.

The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes links for Setup, Developer Console, Help, and Logout. The main content area displays the configuration for an Outbound Message named 'newHire'. The configuration details are as follows:

Outbound Message: Contact			
Name	newHire	User to send as	Adeptia Dev
Unique Name	newHire	API Version	28.0
Description	new contact		
Object	Contact		
Endpoint URL	http://[redacted]:8080/ws/services/newHire...	Modified By	Adeptia Dev, 6/5/2013 9:14 AM
Endpoint WSDL	Click for WSDL		
Send Session ID	<input type="checkbox"/>		
Fields to Send	AccountId Birthdate Department Description Email FirstName Id LastName Phone Title		
Created By	Adeptia Dev, 6/5/2013 9:14 AM		

Red checkmarks are visible next to the 'Workflow Outbound Message Detail' header and the 'Endpoint URL' field.

Manage Project

Refer to the activities built for this use case by going to Projects

The screenshot shows a web application interface with a navigation bar at the top containing 'Home', 'Develop', and 'Monitor'. Below the navigation bar is a menu with 'Projects', 'Solutions', 'Process', 'Services', 'Events', 'Web Forms', and 'Reports and Dashboards'. The 'Projects' menu item is highlighted with a red checkmark. Below the menu, the page title is 'Projects' with a red checkmark. The main content area is titled 'List of activities included in project "UseCase_Salesforce_Workflow"' with a red checkmark. Below the title are 'Back' and 'Move' buttons. The main content is a table with columns: Name, Description, Owner, and Modified. The table is grouped into sections: Data Mapping (1), Human WorkFlow (2), Process Flow (1), Web Forms (2), Web Service Provider (1), and XML Schema (2). Each section contains one or more rows of activity data.

<input type="checkbox"/>	Name	Description	Owner	Modified
Data Mapping (1)				
<input type="checkbox"/>	Salesforce_Provision_to_Form	mapping to get the data into workflow form	sfdeveloper	11/29/13 19:08
Human WorkFlow (2)				
<input type="checkbox"/>	Manager_Approval	approval task	sfdeveloper	11/29/13 19:21
<input type="checkbox"/>	Select_Preference_Task	task	sfdeveloper	11/29/13 19:21
Process Flow (1)				
<input type="checkbox"/>	UseCase_Salesforce_Workflow	HR Provisioning process triggered by Salesforce	sfdeveloper	11/29/13 20:30
Web Forms (2)				
<input type="checkbox"/>	Manager_Approval	manager approval form for workflow task 2	sfdeveloper	11/29/13 18:58
<input type="checkbox"/>	Select_Preference	select preference form for workflow task 1	sfdeveloper	11/29/13 18:57
Web Service Provider (1)				
<input type="checkbox"/>	HR_Provisioning	HR Provisioning web service	sfdeveloper	11/29/13 18:36
XML Schema (2)				
<input type="checkbox"/>	Provision_Form_XML	form xml	sfdeveloper	11/29/13 19:02
<input type="checkbox"/>	Salesforce_Provision_Schema	Salesforce incoming schema	sfdeveloper	11/29/13 19:04

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Thank You!



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